

Project Name:	Department of Energy BMIS-FM
Project Number:	BMIS-FM Phase I
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SCOPE MANAGEMENT PLAN for

Department of Energy BMIS-FM Project

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Version number	Date	Summary of changes	Revised By
1.01	31 Oct 00	First version	Don A. Cox, PMP
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Approvals

The following people have approved this document. (Sign below name)

Name	Function
Michael Fraser	DOE Program Manager
Signature	Date:

Don A. Cox	Team IBM Program Manager
Signature:	Date:

Distribution

This document has been distributed to:

Name	Function

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Scope Management Plan

1. Objectives

- 1.1. The Scope Management Plan documents how the project scope will be managed and how scope changes will be integrated into this project.

2. Expected Stability of Project Scope

- 2.1. The project has been divided into three major sub-projects based on the implementation of the Oracle Applications at the three DOE Financial Service Centers and related satellite offices. Within each sub-project, we will complete a series of steps based on IBM's Method Blue.
- 2.2. This project will be conducted using formal project management policies and procedures. DOE has carefully defined the scope of the project throughout the proposal process. Team IBM documented their approach in detail in the proposal response. Therefore, the project scope is expected to remain stable, with any scope changes handled according to this plan.

3. Scope Identification and Classification

- 3.1. Scope change control is concerned with:
 - 3.1.1. Influencing the factors that create scope changes to ensure that changes are beneficial.
 - 3.1.2. Determining that a scope change has occurred.
 - 3.1.3. Managing the actual changes when and if they occur.
- 3.2. All change requests must be submitted via the Change Control Process, and will be evaluated for scope impact.
- 3.3. Each scope impact will be classified as one of the following:
 - 3.3.1. Optional – meaning the change is recognized and accepted or rejected with the understanding that the success of the project will not be severely impacted with or without such change. However, there may be instances when an optional change of scope will provide significant strategic value to the organization, and would therefore be worthy of serious consideration.
 - 3.3.2. Mandatory – meaning that the change must be implemented to ensure the stability and/or success of the project product, or as a result of enterprise policies or regulatory requirements.

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4. Scope Change Control Processes

- 4.1. All scope modifications must go through the following Change Control process:
 - 4.1.1. Identify and assess the scope change as outlined in the previous section
 - 4.1.2. Fill out a “*Change Request Form*” and submit the “*Change Request Form*” along with required supporting documentation to the Team IBM project manager.
 - 4.1.3. The Team IBM project manager will review the change request and may possibly request additional documentation prior to review with the DOE project manager.
 - 4.1.4. The Team IBM and DOE project managers will jointly evaluate the change. The DOE project manager, in his capacity as the Contracting Officer’s Representative, ultimately decides if the scope change will be accepted or not. Using the “*Change Request Form*”, the DOE project manager will mark the change as:
 - 4.1.4.1. Approved, in which case both project managers will check the approved box, sign off on the change request and the Team IBM project manager will incorporate the change and adjust other project planning factors as necessary.
 - 4.1.4.2. Approved pending additional supporting documentation, in which case both project managers will check the approved / pending box, sign off on the change request and the Team IBM project manager will specify and coordinate gathering of the required documentation, incorporate the change and adjust other project planning factors as necessary.
 - 4.1.4.3. Denied, in which case both project managers will check the denied box, sign off on the change request and the Team IBM project manager will notify the requestor of the status and reason for denial.
 - 4.1.5. The Team IBM project manager will document the Change Request outcome as necessary (update WBS, schedule and budget documentation if impacted).

5. Scope Verification

- 5.1. Scope verification is the process of formalizing acceptance of the project scope by stakeholders. It involves review of work products and results to ensure that all were completed correctly and satisfactorily.

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- 5.2. The Team IBM project manager will assign responsibility for scope verification to a project team member, preferably a project team lead responsible for QA/QC/Scope Verification, and referred to as the QA lead.
- 5.3. The QA lead is responsible for scheduling time with the Team IBM and DOE project managers other interested stakeholders for purposes of scope verification. This should occur at least once per month or on a schedule that aligns with key milestones and deliverables, and will require presentation of the work results and product documentation for review, inspection and formal acceptance.
- 5.4. Scope verification is a formal approval process, and should be considered in that context. The reviewers will accept or reject specific items being reviewed, and will sign off on the Scope Verification Form. The signoff indicates that the process was conducted, not whether a specific item was verified.
- 5.5. The QA lead is responsible for coordinating resubmission of items not verified and will work with the Team IBM project manager to schedule rework, corrective action as required.

6. Associated Documents

- 6.1. The following documents may be impacted by any scope change. They should be reviewed each time a scope change is approved and updated as necessary.
 - 6.1.1. Initial Verification of Project Scope Document
 - 6.1.2. Supporting Documentation
 - 6.1.3. Assumptions and Constraints Document
 - 6.1.4. Work Breakdown Structure
 - 6.1.5. MS Project Planning Documents
 - 6.1.6. Cost Estimates
 - 6.1.7. Project Schedule